

# 2021 K-1 Analyzer Import into 1065 from Partnerships

1065 Description	IRS Line	Organizer Description	Organizer EORG
Investment Name (Required)		Activity name	PTENAME
Entity Type (Required)			
Return ID			
Activity Number		Activity Number	PTESET
Ownership (T/S/J) (1040 output only)			
Tags (comma delineated)			
Tax Year Beginning (MM/DD/YYYY)			
Tax Year End (MM/DD/YYYY)			
K-1 Final?		Fully disposed of during the current year	PTEDISP
Amended K-1			
Partnership EIN (9 digits NO dashes)		Federal EIN	PTEID
Partnership Address			
Partnership City			
Partnership State			
Partnership Zip Code			
Partnership Foreign Province			
Partnership Foreign Postal Code			

# 2021 K-1 Analyzer Import into 1065 from Partnerships

1065 Description

IRS Line

Organizer Description

Organizer EORG

Partnership Foreign Country

Partnership Region

IRS Center where partnership filed return

Publicly traded partnership (PTP)

Publicly traded partnership

PTEPUBLIC

Partner's Identifying Number

General partner or LLC member-manager

Limited partner or other LLC member

Domestic Partner

Foreign Partner

Disregarded Entity

Disregarded Entity TIN

Disregarded Entity Name

What type of entity is this partner?

Is this partner a retirement plan (IRA/SEP/Keogh/etc.) ?

Beginning of the Year Profit Percentage

End of the Year Profit Percentage

Beginning of the Year Loss Percentage

# 2021 K-1 Analyzer Import into 1065 from Partnerships

1065 Description

IRS Line

Organizer Description

Organizer EORG

End of the Year Loss Percentage

Beginning of the Year Capital Percentage

End of the Year Capital Percentage

Decrease is due to sale or exchange of partnership interest

Nonrecourse

Qualified nonrecourse financing

Recourse

Item K includes liability amounts from lower tier partnerships

Beginning capital account

Capital contributed during the year

Current year net income (loss)

Other increase (decrease)

Withdrawals and Distributions

Ending capital account

Book Value

Did the partner contribute property with a built-in gain or loss?

# 2021 K-1 Analyzer Import into 1065 from Partnerships

1065 Description	IRS Line	Organizer Description	Organizer EORG
Beginning Partner's Share of Net Unrecognized Section 704(c) Gain or (Loss)			
Ending Partner's Share of Net Unrecognized Section 704(c) Gain or (Loss)			
Schedule K-3 is attached			
More than one activity for at-risk purposes*			
More than one activity for passive activity purposes*			
Federal K-1			
If state, enter abbreviation			
Ordinary business income	Line 1	Ordinary income (loss) from pass-through entities	PTEORDINC
Net rental real estate income (loss)	Line 2	Rental real estate income (loss) (Override)	PTERENTAL
Other net rental income (loss)	Line 3	Other rental income (loss)	PTEORENTAL
Guaranteed payments for services	Line 4a	Guaranteed payments services	X22.7087.168
Guaranteed payments for capital	Line 4b	Guaranteed payments capital	X22.7087.171
Total guaranteed payments	Line 4c		
Interest Income	Line 5	Interest income (Override)	X22.7087.144
Ordinary dividends	Line 6a	Ordinary dividends (Override)	X22.7087.147
Qualified dividends	Line 6b	Qualified dividends - included in investment income	X22.7078.159

## 2021 K-1 Analyzer Import into 1065 from Partnerships

1065 Description	IRS Line	Organizer Description	Organizer EORG
Dividend equivalents	Line 6c	Dividend equivalents	X22.7021.146
Royalties	Line 7	Royalty income	PTEROYAL
Net short-term capital gain (loss)	Line 8	Short-term capital gain/loss	PTESTCAPITAL
Net long-term capital gain (loss)	Line 9a	Long-term capital gain/loss	PTELTCAPITAL
Collectibles (28%)	Line 9b	Collectibles (28%) gain (loss)	PTERLTCG
Unrecaptured section 1250 gain	Line 9c	Unrecaptured section 1250 gain (loss)	X22.7020.168
Net section 1231 gain (loss)	Line 10	Net Section 1231 gain (loss) (Override)	PTE1231
Other income(loss)	Line 11A	Other portfolio income	PTEOPORT
Involuntary conversions	Line 11B	Net involuntary conversion gain (loss) (Override)	PTECONV
Section 1256 contracts, straddles	Line 11C	Section 1256 gain/loss	X22.7016.172
Mining Exploration costs recapture	Line 11D	Mining exploration costs recapture	X22.7115.167
Cancellation of Debt	Line 11E	Cancellation of debt	X22.7115.170
Section 743(b) positive adjustments	Line 11F	Section 743(b) positive adjustments	X22.7252.130
Income under subpart F(other than inclusions under sections 951A and 965)	Line 11H	Income under subpart F (other than inclusions under 951A and 965)	X22.7087.165
Other Income (loss)	Line 11I	Other income	PTEMISCINC
Section 179 deduction	Line 12	Sec. 179 expense (treated as other than listed property	PTE179
Cash contributions 50%	Line 13A	Cash contributions (60%)	PTEC50

## 2021 K-1 Analyzer Import into 1065 from Partnerships

1065 Description	IRS Line	Organizer Description	Organizer EORG
Cash contributions 30%	Line 13B	Cash contributions (30%)	PTEC30
NonCash contributions 50%	Line 13C	Noncash contributions (50%)	PTEN50
NonCash contributions 30%	Line 13D	Noncash contributions (30%)	PTEN30
Capital gain property to a 50% organization (30%)	Line 13E	Capital gain property to a 50% org (30%)	PTEC20
Capital gain property (20%)	Line 13F	Capital gain property (20%)	PTEN20
Contributions 100%	Line 13G	Noncash contributions (100%) - Qual Conservation	PTEN100
Investment interest expense	Line 13H	Investment interest expense on investment debt	PTEINVINT
Deductions - royalty income	Line 13I	Deductions - royalty	X22.7143.128
Section 59(e)(2) expenditures	Line 13J	Section 59(e)(2) expenditures	PTESEC59E
Excess business interest expense	Line 13K	Excess business interest expense	X22.7019.163
Deductions portfolio (other)	Line 13L	Deductions - portfolio (other)	X22.7016.169
Amounts paid for medical insurance	Line 13M	Amounts paid for medical insurance	X22.7143.131
Educational assistance benefits	Line 13N	Educational assistance benefits	X22.7143.134
Dependent care benefits	Line 13O	Dependent care benefits	X22.7143.137
Preproductive period expenses	Line 13P	Preproductive period expenses	X22.7143.140
Pensions and IRAs	Line 13R	Pensions and IRAs	X22.7143.146
Reforestation expense deduction	Line 13S	Reforestation expense deduction	X22.7143.149

## 2021 K-1 Analyzer Import into 1065 from Partnerships

1065 Description	IRS Line	Organizer Description	Organizer EORG
Section 743(b) negative adjustments	Line 13V	Section 743(b) negative adjustments	X22.7252.132
Other deductions	Line 13W	Other deductions	PTEMISCD
Net earnings (loss) from self-employment	Line 14A		
Gross farming or fishing income	Line 14B		
Gross non-farm income	Line 14C		
Low-income housing credit (section 42(j)(5)) from post-2007 buildings	Line 15C	Low income housing credit (section 42(j)(5)) from post-2007 buildings	PTE42J5
Low-income housing credit (other) from post-2007 buildings	Line 15D	Low income housing credit (other) from post-2007 buildings	PTEO42J5
Qualified rehabilitation expenditures (rental real estate)	Line 15E	Qualified rehabilitation expenditures related to rental estate	PTEREHAB
Other rental real estate credits	Line 15F	Other rental real estate credits	PTERCREDIT
Other rental credits	Line 15G	Other rental credits	PTEORCR
Undistributed capital gains credit	Line 15H	Undistributed capital gains credit	X22.7114.143
Alcohol and cellulosic biofuel fuels credit	Line 15I	Biofuel producer credit	CREAL
Work opportunity credit	Line 15J	Work opportunity credit	X22.7114.146
Disabled access credit	Line 15K	Disabled access credit	X22.7114.152
Empowerment zone and renewal community employment credit	Line 15L	Empowerment zone employment credit	X22.7114.155
Credit for increasing research activities	Line 15M	Credit for increasing research activities	X22.7114.158

## 2021 K-1 Analyzer Import into 1065 from Partnerships

1065 Description	IRS Line	Organizer Description	Organizer EORG
Credit for employer social security and Medicare taxes	Line 15N	Credit for employer social security & medicare	EMSS
Backup withholding	Line 15O	Backup withholding	BWITH
Other credits	Line 15P	Other credits	PTEOCRAMT
Total foreign taxes paid	Line 21	Total foreign taxes paid (Choose one: either paid or accrued)	X22.7060.155
Post-1986 depreciation adjustment	Line 17A	Post-1986 depreciation adjustment (Override)	PTEDEPR
Adjusted gain or loss	Line 17B	Adjusted gain (loss) (Override)	PTEBASIS
Depletion (other than oil & gas)	Line 17C	Depletion (other than oil and gas)	PTEDEPL
Oil, gas, & geothermal—gross income	Line 17D	Oil, gas and geothermal - gross income	PTEOIL
Oil, gas, & geothermal—deductions	Line 17E	Oil, gas and geothermal - deductions	PTEOILDED
Other AMT items	Line 17F	Other AMT items	PTEOPREF
Tax-exempt interest income	Line 18A	Tax-exempt interest income	PTEEXEMPT
Other tax-exempt income	Line 18B	Other tax-exempt income	PTEOEXEMPT
Nondeductible expenses	Line 18C	Nondeductible expenses (Override)	PTENONDED
Cash and marketable securities	Line 19A		
Distribution subject to section 737	Line 19B		
Other property	Line 19C		
Unrelated business taxable income	Line 20V	Unrelated business taxable income	X22.7115.164



## 2021 K-1 Analyzer Import into 1065 from Partnerships

1065 Description	IRS Line	Organizer Description	Organizer EORG
Investment income	Line 20A	Investment income (Override)	PTEINVINC
Investment expenses	Line 20B	Investment expenses (Override)	PTEINVEXP
Fuel tax credit information	Line 20C		
Qualified rehabilitation expenditures (other than rental real estate)	Line 20D	Qualified rehabilitation exp. related to rental estate(other than RRE)	X22.7114.161
Basis of energy property	Line 20E	Basis of energy property	X22.7114.164
Recapture of low-income housing credit (section 42(j)(5))	Line 20F	Recapture of low-income housing credit (section 42(j)(5)) (Override)	PTERECF
Recapture of low-income housing credit (other)	Line 20G	Recapture of low-income housing credit (other) (Override)	PTERECO
Recapture of investment credit	Line 20H	Recapture of investment credit	X22.7114.173
Recapture of other credits	Line 20I	Recapture of other credits	X22.7114.170
Look-back interest—completed long-term contracts	Line 20J	Look-back interest -- completed long-term contracts	X22.7115.146
Look-back interest—income forecast method	Line 20K	Look-back interest -- income forecast method	X22.7115.149
Dispositions of property with section 179 deductions	Line 20L		
Recapture of section 179 deduction	Line 20M	Recapture of section 179 deduction	X22.7159.128
Interest expense for corporate partners	Line 20N	Interest expense for corporate partners	X22.7159.131
Section 453(l)(3) information	Line 20O	Section 453(l)(3) information	X22.7115.152
Section 453A(c) information	Line 20P	Section 453A(c) information	X22.7115.155

## 2021 K-1 Analyzer Import into 1065 from Partnerships

1065 Description	IRS Line	Organizer Description	Organizer EORG
Section 1260(b) information	Line 20Q	Section 1260(b) information	X22.7115.158
Interest allocable to production expenditures	Line 20R	Interest allocable to production expenditures	X22.7159.134
CCF nonqualified withdrawals	Line 20S	CCF nonqualified withdrawals	X22.7159.137
Depletion information	Line 20T		
Cost Depletion	Line 20T1		
Percentage Depletion	Line 20T2		
Section 743(b) basis adjustment	Line 20U		X22.7264.130
Precontribution gain (loss)	Line 20W	Precontribution gain (loss)	X22.7115.173
Section 108(i) information	Line 20X		
Net Investment Income	Line 20Y	Net investment income	X22.7179.167
Section 199A income	Line 20Z	IRC § 199A Ordinary business income (loss) (Override)	X22.7262.128
Section 704(c) information	Line 20AA	IRC § 704(c) information	X22.7159.140
Section 751 gain(loss)	Line 20AB	IRC § 751 gain (loss)	X22.7159.149
Section 1(h)(5) gain(loss)	Line 20AC	IRC § 1(h)(5) gain (loss)	X22.7159.170
Deemed section 1250 unrecaptured gain	Line 20AD	Deemed IRC § 1250 unrecaptured gain	X22.7159.173
Excess taxable income	Line 20AE	Excess taxable income	X22.7232.149
Excess business interest income	Line 20AF	Excess business interest income	X22.7232.152

## 2021 K-1 Analyzer Import into 1065 from Partnerships

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1065 Description	IRS Line	Organizer Description	Organizer EORG
Gross Receipts for section 448(c)	Line 20AG	Gross receipts for section 448(c)	X22.7232.155
Other information	Line 20AH		

# 2021 K-1 Analyzer Import into 1065 from S Corporations

1120S Description	IRS Line	Organizer Description	Organizer EORG
Investment Name (Required)		Activity name	PTENAME
Entity Type (Required)			
Return ID			
Activity Number		Activity Number	PTESET
Ownership (T/S/J) (1040 output only)			
Tags (comma delineated)			
Tax Year Beginning (MM/DD/YYYY)			
Tax Year End (MM/DD/YYYY)			
K-1 Final?		Fully disposed of during the current year	PTEDISP
Amended K-1			
Corporation EIN (9 digits NO dashes)		Federal EIN	PTEID
Corporation Address			
Corporation City			
Corporation State			
Corporation Zip Code			
Corporation Foreign Province			
Corporation Foreign Postal Code			

# 2021 K-1 Analyzer Import into 1065 from S Corporations

## 1120S Description

## IRS Line

## Organizer Description

## Organizer EORG

Corporation Foreign Country

Corporation Region

IRS Center where corporation filed return

Shareholder's Identifying Number

Shareholder's percentage of stock ownership for tax year

More than one activity for at-risk purposes\*

More than one activity for passive activity purposes\*

Federal K-1

If state, enter abbreviation

Ordinary business income

Line 1

Ordinary income (loss) from pass-through entities

PTEORDINC

Net rental real estate income (loss)

Line 2

Rental real estate income (loss) (Override)

PTERENTAL

Other net rental income (loss)

Line 3

Other rental income (loss)

PTEORENTAL

Interest Income

Line 4

Interest income (Override)

X22.7087.144

Ordinary dividends

Line 5a

Ordinary dividends (Override)

X22.7087.147

Qualified dividends

Line 5b

Qualified dividends - included in investment income

X22.7078.159

Royalties

Line 6

Royalty income

PTEROYAL

Net short-term capital gain (loss)

Line 7

Short-term capital gain/loss

PTESTCAPITAL

## 2021 K-1 Analyzer Import into 1065 from S Corporations

1120S Description	IRS Line	Organizer Description	Organizer EORG
Net long-term capital gain (loss)	Line 8a	Long-term capital gain/loss	PTELTCAPITAL
Collectibles (28%)	Line 8b	Collectibles (28%) gain (loss)	PTERLTCG
Unrecaptured section 1250 gain	Line 8c	Unrecaptured section 1250 gain (loss)	X22.7020.168
Net section 1231 gain (loss)	Line 9	Net Section 1231 gain (loss) (Override)	PTE1231
Other portfolio income(loss)	Line 10A	Other portfolio income	PTEOPORT
Involuntary conversions	Line 10B	Net involuntary conversion gain (loss) (Override)	PTECONV
Section 1256 contracts, straddles	Line 10C	Section 1256 gain/loss	X22.7016.172
Mining exploration costs recapture	Line 10D	Mining exploration costs recapture	X22.7115.167
Section 951A Income	Line 10E	Section 951A income	X22.7021.165
Inclusions of subpart F income	Line 10F	Income under subpart F (other than inclusions under 951A and 965)	X22.7087.165
Section 951(a)(1)(B) inclusions	Line 10G		
Other income (loss)	Line 10H	Other income	PTEMISCINC
Section 179 deduction	Line 11	Sec. 179 expense (treated as other than listed property)	PTE179
Cash contributions 60%	Line 12A	Cash contributions (60%)	PTEC50
Cash contributions 30%	Line 12B	Cash contributions (30%)	PTEC30
Noncash contributions 50%	Line 12C	Noncash contributions (50%)	PTEN50
Noncash contributions 30%	Line 12D	Noncash contributions (30%)	PTEN30

## 2021 K-1 Analyzer Import into 1065 from S Corporations

1120S Description	IRS Line	Organizer Description	Organizer EORG
Capital gain property to a 50% organization (30%)	Line 12E	Capital gain property to a 50% org (30%)	PTEC20
Capital gain property (20%)	Line 12F	Capital gain property (20%)	PTEN20
Contributions 100%	Line 12G	Noncash contributions (100%) - Qual Conservation	PTEN100
Investment interest expense	Line 12H	Investment interest expense on investment debt	PTEINVINT
Deductions - royalty income	Line 12I	Deductions - royalty	X22.7143.128
Section 59(e)(2) expenditures	Line 12J	Section 59(e)(2) expenditures	PTESEC59E
Deductions portfolio (other)	Line 12L	Deductions - portfolio (other)	X22.7016.169
Preproductive period expenses	Line 12M	Preproductive period expenses	X22.7143.140
Reforestation expense deduction	Line 12O	Reforestation expense deduction	X22.7143.149
Other deductions	Line 12S	Other deductions	PTEMISCDED
Low-income housing credit (section 42(j)(5)) from post-2007 buildings	Line 13C	Low income housing credit (section 42(j)(5)) from post-2007 buildings	PTE42J5
Low-income housing credit (other) from post-2007 buildings	Line 13D	Low income housing credit (other) from post-2007 buildings	PTEO42J5
Qualified rehabilitation expenditures (rental real estate)	Line 13E	Qualified rehabilitation expenditures related to rental estate	PTEREHAB
Other rental real estate credits	Line 13F	Other rental real estate credits	PTERCREDIT
Other rental credits	Line 13G	Other rental credits	PTEORCR
Undistributed capital gains credit	Line 13H	Undistributed capital gains credit	X22.7114.143

## 2021 K-1 Analyzer Import into 1065 from S Corporations

1120S Description	IRS Line	Organizer Description	Organizer EORG
Alcohol and cellulosic biofuel fuels credit	Line 13I	Biofuel producer credit	CREAL
Work opportunity credit	Line 13J	Work opportunity credit	X22.7114.146
Disabled access credit	Line 13K	Disabled access credit	X22.7114.152
Empowerment zone and renewal community employment credit	Line 13L	Empowerment zone employment credit	X22.7114.155
Credit for increasing research activities	Line 13M	Credit for increasing research activities	X22.7114.158
Credit for employer social security and Medicare taxes	Line 13N	Credit for employer social security & medicare	EMSS
Backup withholding	Line 13O	Backup withholding	BWITH
Other credits	Line 13P	Other credits	PTEOCRAMT
Total foreign taxes paid	Line 16F	Total foreign taxes paid (Choose one: either paid or accrued)	X22.7060.155
Total foreign taxes accrued	Line 14Q	Total foreign taxes accrued (Choose one: either paid or accrued)	
Post-1986 depreciation adjustment	Line 15A	Post-1986 depreciation adjustment (Override)	PTEDEPR
Adjusted gain or loss	Line 15B	Adjusted gain (loss) (Override)	PTEBASIS
Depletion (other than oil & gas)	Line 15C	Depletion (other than oil and gas)	PTEDEPL
Oil, gas, & geothermal—gross income	Line 15D	Oil, gas and geothermal - gross income	PTEOIL
Oil, gas, & geothermal—deductions	Line 15E	Oil, gas and geothermal - deductions	PTEOILDED
Other AMT items	Line 15F	Other AMT items	PTEOPREF



## 2021 K-1 Analyzer Import into 1065 from S Corporations

1120S Description	IRS Line	Organizer Description	Organizer EORG
Tax-exempt interest income	Line 16A	Tax-exempt interest income	PTEEXEMPT
Other tax-exempt income	Line 16B	Other tax-exempt income	PTEOEXEMPT
Nondeductible expenses	Line 16C	Nondeductible expenses (Override)	PTENONDED
Distributions	Line 16D		
Repayment of loans from shareholders	Line 16E		
Investment income	Line 17A	Investment income (Override)	PTEINVINC
Investment expenses	Line 17B	Investment expenses (Override)	PTEINVEXP
Qualified rehabilitation expenditures (other than rental real estate)	Line 17C	Qualified rehabilitation exp. related to rental estate(other than RRE)	X22.7114.161
Basis of energy property	Line 17D	Basis of energy property	X22.7114.164
Recapture of low-income housing credit (section 42(j)(5))	Line 17E	Recapture of low-income housing credit (section 42(j)(5)) (Override)	PTERECF
Recapture of low-income housing credit (other)	Line 17F	Recapture of low-income housing credit (other) (Override)	PTERECO
Recapture of investment credit	Line 17G	Recapture of investment credit	X22.7114.173
Recapture of other credits	Line 17H	Recapture of other credits	X22.7114.170
Look-back interest—completed long-term contracts	Line 17I	Look-back interest -- completed long-term contracts	X22.7115.146
Look-back interest—income forecast method	Line 17J	Look-back interest -- income forecast method	X22.7115.149
Dispositions of property with section 179 deductions	Line 17K		

## 2021 K-1 Analyzer Import into 1065 from S Corporations

1120S Description	IRS Line	Organizer Description	Organizer EORG
Recapture of section 179 deduction	Line 17L	Recapture of section 179 deduction	X22.7159.128
Section 453(l)(3) information	Line 17M	Section 453(l)(3) information	X22.7115.152
Section 453A(c) information	Line 17N	Section 453A(c) information	X22.7115.155
Section 1260(b) information	Line 17O	Section 1260(b) information	X22.7115.158
Interest allocable to production expenditures	Line 17P	Interest allocable to production expenditures	X22.7159.134
CCF nonqualified withdrawals	Line 17Q	CCF nonqualified withdrawals	X22.7159.137
Depletion information	Line 17R		
Net Investment Income	Line 17U	Net investment income	X22.7179.167
Section 199A information	Line 17V	IRC § 199A Ordinary business income (loss) (Override)	X22.7262.128
Excess taxable income	Line 17AA	Excess taxable income	X22.7232.149
Excess business interest income	Line 17AB	Excess business interest income	X22.7232.152
Gross Receipts for section 448(c)	Line 17AC	Gross receipts for section 448(c)	X22.7232.155
Other information	Line 17AC		

# 2021 K-1 Analyzer Import into 1065 from Trusts

1041 Description	IRS Line	Organizer Description	Organizer EORG
Investment Name (Required)		Activity name	PTENAME
Entity Type (Required)			
Return ID			
Activity Number		Activity Number	PTESET
Ownership (T/S/J) (1040 output only)			
Tags (comma delineated)			
Tax Year Beginning (MM/DD/YYYY)			
Tax Year End (MM/DD/YYYY)			
K-1 Final?		Fully disposed of during the current year	PTEDISP
Amended K-1			
Estate or trust's EIN (9 digits NO dashes)		Federal EIN	PTEID
Fiduciary's Address			
Fiduciary's City			
Fiduciary's State			
Fiduciary's Zip Code			
Fiduciary's Foreign Province			
Fiduciary's Foreign Postal Code			

# 2021 K-1 Analyzer Import into 1065 from Trusts

1041 Description	IRS Line	Organizer Description	Organizer EORG
Fiduciary's Foreign Country			
Fiduciary's Region			
Beneficiary's Identifying Number			
Domestic beneficiary			
Foreign beneficiary			
Check if Form 1041-T was filed and enter the date it was filed			
Check if this is the final Form 1041 for the estate or trust			
More than one activity for at-risk purposes*			
More than one activity for passive activity purposes*			
Federal K-1			
If state, enter abbreviation			
Ordinary business income	Line 6	Ordinary income (loss) from pass-through entities	PTEORDINC
Net rental real estate income	Line 7	Rental real estate income (loss) (Override)	PTERENTAL
Other rental income	Line 8	Other rental income (loss)	PTEORENTAL
Interest Income	Line 1	Interest income (Override)	X22.7087.144
Ordinary dividends	Line 2a	Ordinary dividends (Override)	X22.7087.147
Qualified dividends	Line 2b	Qualified dividends - included in investment income	X22.7078.159

## 2021 K-1 Analyzer Import into 1065 from Trusts

1041 Description	IRS Line	Organizer Description	Organizer EORG
Net short-term capital gain	Line 3	Short-term capital gain/loss	PTESTCAPITAL
Net long-term capital gain	Line 4a	Long-term capital gain/loss	PTELTCAPITAL
28% rate gain	Line 4b	Collectibles (28%) gain (loss)	PTERLTCG
Unrecaptured section 1250 gain	Line 4c	Unrecaptured section 1250 gain (loss)	X22.7020.168
Other portfolio and nonbusiness income	Line 5	Other portfolio income	PTEOPORT
Depreciation	Line 9A		
Depletion	Line 9B		
Amortization	Line 9C		
Estate tax deduction	Line 10		
Excess deductions - Section 67(e) expenses	Line 11A		
Excess deductions - Non-miscellaneous itemized deductions	Line 11B		
Short-term capital loss carryover	Line 11C		
Long-term capital loss carryover	Line 11D		
Net operating loss carryover -- regular tax	Line 11E		
Net operating loss carryover -- minimum tax	Line 11F		
Gross farm and fishing income	Line 14F		

## 2021 K-1 Analyzer Import into 1065 from Trusts

1041 Description	IRS Line	Organizer Description	Organizer EORG
Low-income housing credit	Line 13C	Low income housing credit (section 42(j)(5)) from post-2007 buildings	PTE42J5
Rehabilitation credit and energy credit	Line 13D	Qualified rehabilitation expenditures related to rental estate	PTEREHAB
Biofuel producer credit	Line 13H	Biofuel producer credit	CREAL
Work opportunity credit	Line 13F	Work opportunity credit	X22.7114.146
Empowerment zone employment credit	Line 13K	Empowerment zone employment credit	X22.7114.155
Credit for increasing research activities	Line 13I	Credit for increasing research activities	X22.7114.158
Credit for backup withholding	Line 13B	Backup withholding	BWITH
Other credits	Line 13Z	Other credits	PTEOCRAMT
Foreign taxes	Line 14B	Total foreign taxes paid (Choose one: either paid or accrued)	X22.7060.155
Adjustment for minimum tax purposes	Line 12A		
AMT adjustment attributable to qualified dividends	Line 12B		
Accelerated depreciation	Line 12G	Post-1986 depreciation adjustment (Override)	PTEDEPR
Depletion	Line 12H	Depletion (other than oil and gas)	PTEDEPL
Amortization	Line 12I		
Exclusion items	Line 12J		
AMT adjustment attributable to net short-term capital gain	Line 12C		

## 2021 K-1 Analyzer Import into 1065 from Trusts

1041 Description	IRS Line	Organizer Description	Organizer EORG
AMT adjustment attributable to net long-term capital gain	Line 12D		
AMT adjustment attributable to unrecaptured section 1250 gain	Line 12E		
AMT adjustment attributable to 28% rate gain	Line 12F		
Tax-exempt interest	Line 14A	Tax-exempt interest income	PTEEXEMPT
Net investment income	Line 14E	Investment income (Override)	PTEINVINC
Credit for estimated taxes	Line 13A		
Other qualifying investment credit	Line 13E		
Credit for small employer health insurance premiums	Line 13G	Credit for small employer health insurance premiums	X22.7179.143
Renewable electricity, refined coal, and Indian coal production credit	Line 13J		
Orphan drug credit	Line 13M	Orphan drug credit	X22.7159.152
Indian employment credit	Line 13L	Indian employment credit	X22.7159.146
Credit for employer-provided child care and facilities	Line 13N	Credit for employer provided child care facilities	X22.7159.161
Credit for employer differential wage payments	Line 13Q	Credit for employer differential wage payments	X22.7179.131
Biodiesel and renewable diesel fuels credit	Line 13O	Biodiesel fuels credit	X22.7169.137
Credit to holders of tax credit bonds	Line 13P	Credit to holders of tax credit bonds	X22.7169.155
Recapture of credits	Line 13R	Recapture of other credits	X22.7114.170

## 2021 K-1 Analyzer Import into 1065 from Trusts

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1041 Description	IRS Line	Organizer Description	Organizer EORG
Qualified business income, section 199A	Line 14I	IRC § 199A Ordinary business income (loss) (Override)	X22.7262.128
Other information	Line 14Z		